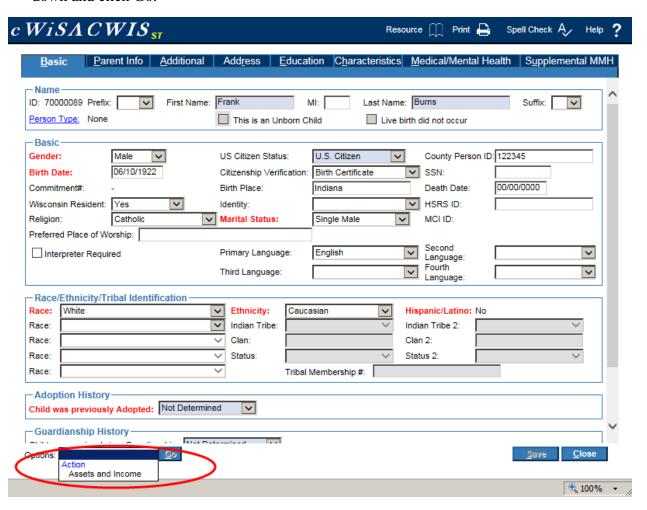
Assets and Income

Note: In order to create or update an asset and income record, an assignment to the case is not needed. However, additional security is needed for the Assets and Income page when accessed via the Utilities menu.

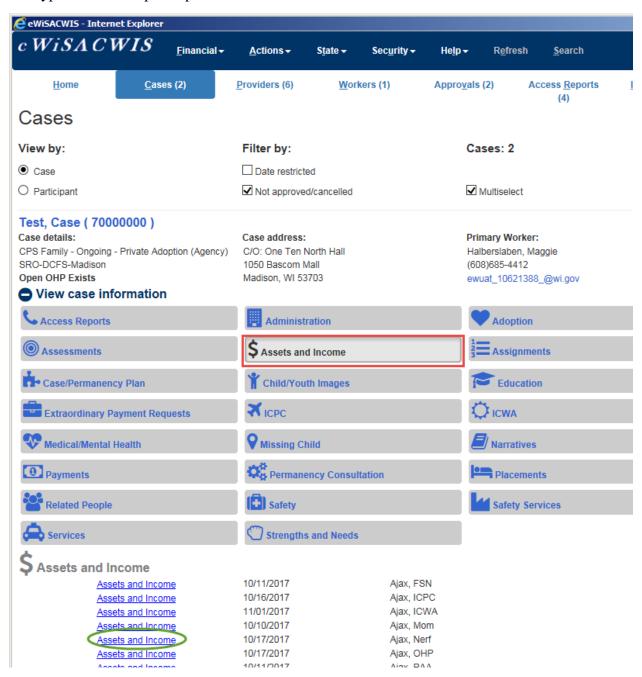
The Assets and Income page allows workers to view and document asset, income, expense, and employment information for a person. Additionally, SSI information will display, if applicable.

- 1. There are three ways to access the Assets and Income page:
 - a. From any tab on the Person Management page, select Assets and Income from the Options drop-down and click Go.



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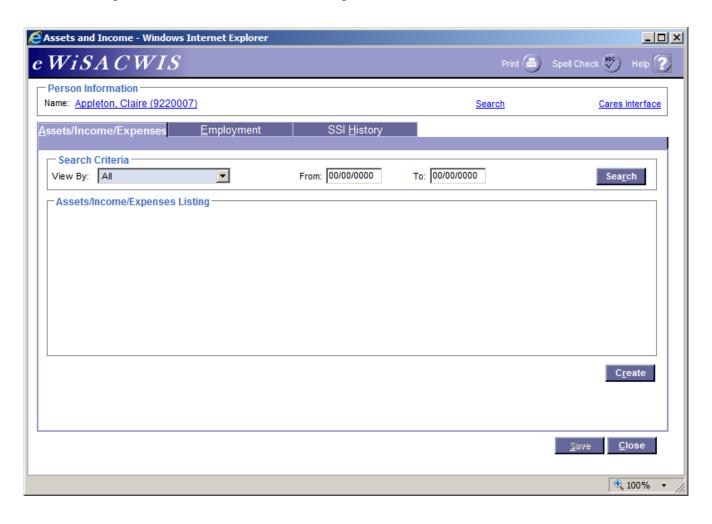
b. From the desktop, expand the Assets and Income icon for the case. Click on the appropriate hyperlink for the participant.



2. On the Assets and Income page, when an MCI ID exists for the person, the <u>Cares Interface</u> hyperlink appears. When you click the hyperlink, eWiSACWIS will send a call to CARES to request a matched individual based on the MCI ID. eWiSACWIS will immediately update with all fields returned from CARES.

Note: If the MCI ID does not automatically populate with the individual's name, DOB and SSN documented, remove the individual's middle initial and tab out of the field, the MCI ID should then populate into that field.

3. The Assets/Income/Expenses tab displays a list of assets, income, and expenses. It allows you to search by type, as well as specific dates. Click Create to add a new asset, income, or expense record. This will open the Maintain Assets/Income/Expense Record.

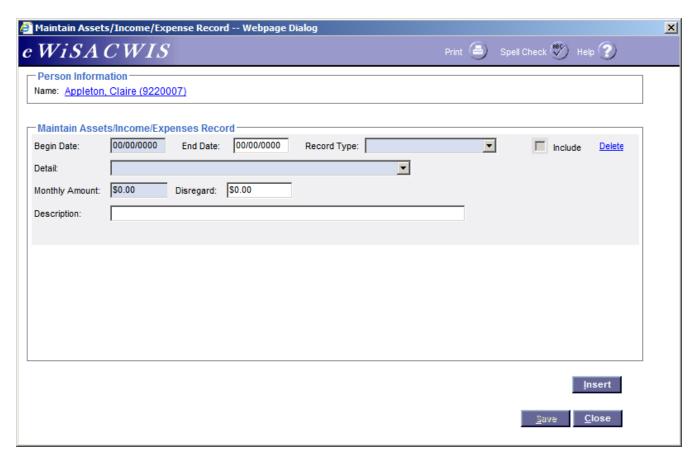


4. The Maintain Assets/Income/Expense Record page allows you to view and document asset, income, and expense information for a person. Enter the Begin Date. If applicable, enter the End Date. Select a Record Type. The Include checkbox is used by the eligibility unit to verify the asset/income/expense information. Select a value from the Detail drop-down – the options that appear in the list are based on the Record Type that was selected. If applicable, enter an amount in the Disregard field. Click Save. Once the record is saved, a Copy hyperlink appears.

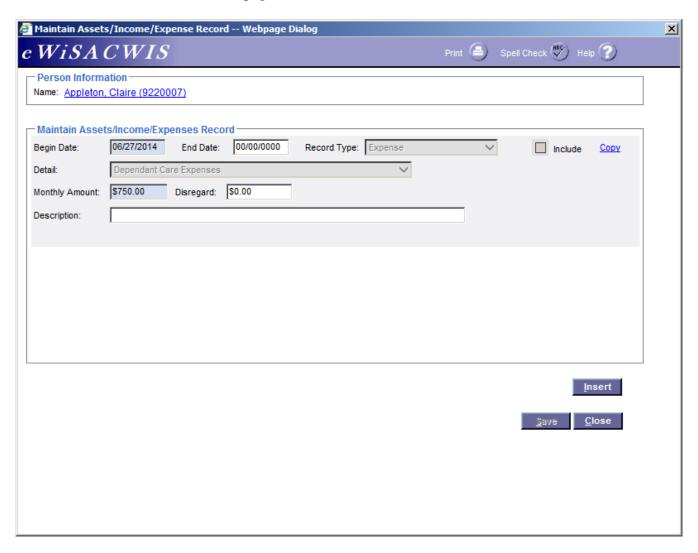
Note: When you select Countable Asset or Exempt Asset from the Record Type, the Monthly Amount field will disable and the Market Value field will display.

Note: When you select Child Support from the Detail drop-down (Type = Countable Unearned Income), the "Applies to" field will appear and a <u>Search</u> hyperlink will display to the right of it. Selecting the <u>Search</u> hyperlink will launch the Person Search page (for you to select the child that the child support applies to).

Note: When you select Child Support Paid from the Detail drop-down (Type = Expense), the "Applies to" field will appear and a <u>Search</u> hyperlink will display to the right of it. Selecting the <u>Search</u> hyperlink will launch the Person Search page. Selecting the No PID checkbox will disable the Search hyperlink.



5. New records can be created by selecting the Insert button or by selecting the Copy hyperlink (if you have clicked Save), which will allow you to copy information from the existing records. Selecting the Copy hyperlink will insert a new record on the page. The inserted record will have a Detail identical to that of the record it was copied from, allowing you to modify the record. Click Close to return to the Assets and Income page.

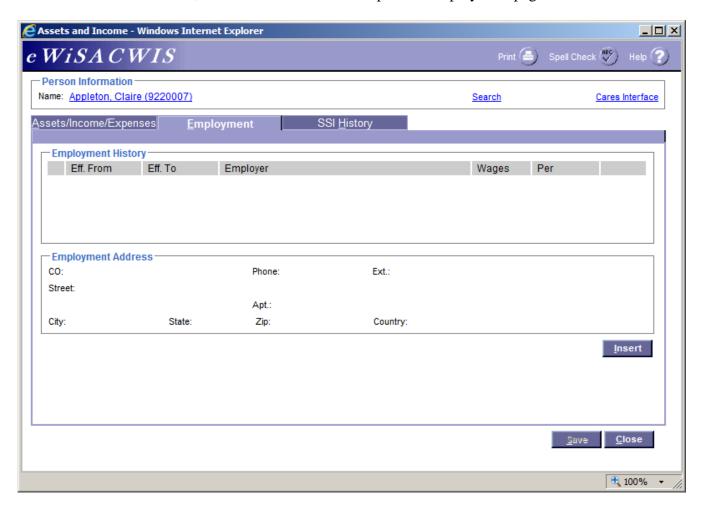


6. The Assets/Income/Expenses tab now displays the newly inserted records. The Search Criteria section allows you to control the display of results based on the record type, as well as date parameters. The Assets/Income/Expenses Listing group box will display the retrieved records in the sortable columns. To change existing information, select the Edit hyperlink to access the Maintain Assets/Income/Expense Record.

Note: The Amount field will display in red for any expenses, however the negative needs to be manually entered in front of the amount so that it displays with parentheses around them which will then behave like a deduction on the Title IV-E Eligibility Financial Worksheet.

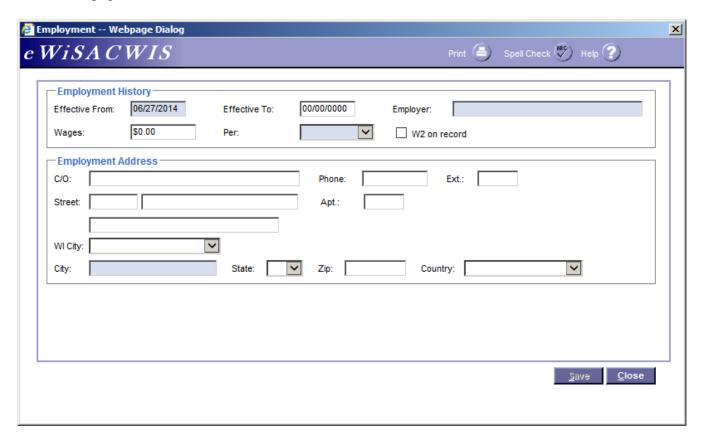


7. The Employment tab is used to view and update information about the person's employment history. To add new information, select the Insert button to open the Employment page.

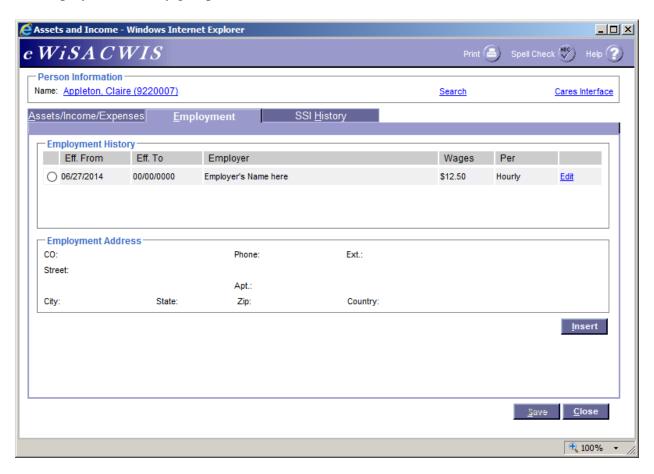


8. The Employment page is used to create or change information pertaining to employment records. The Effective From field will default to today's date but can be edited as needed. If applicable, enter an Effective To date. Enter the Employer and Wages, and select the frequency from the Per dropdown (hourly, bi-weekly, weekly, semi-monthly, month, year). If a W2 form is on file, select the "W2 on record" checkbox.

Enter the employer's address information. Click Save. Then click Close to return to the Assets and Income page.



9. To change existing information, select the <u>Edit</u> hyperlink to access the Employment pop-up page. To view the employment address information, select the radio button next to the associated employer (in the Employment History group box).

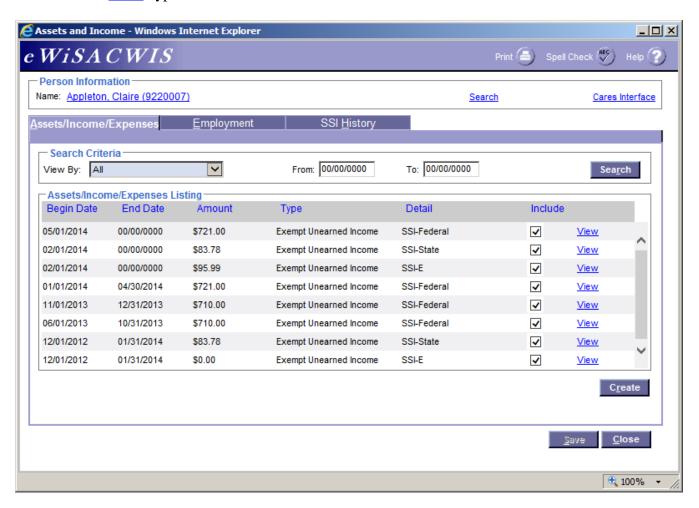


10. The SSI History tab is used to view SSI Application and Benefits History. The tab displays information pertaining to SSI data that is received from CARES. The tab will update with the corresponding Application date. A SSI History row will be complete once an End Date is received from CARES. A new SSI row will be recorded once a Determination Date or Application Date is received.



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To view the details of the SSI history, click on the Assets/Income/Expenses tab and click the associated <u>View</u> hyperlink.



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